



State of Louisiana
DIVISION OF ADMINISTRATION

OFFICE OF STATE UNIFORM PAYROLL

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November 19, 2001

OFFICE OF STATE UNIFORM PAYROLL MEMORANDUM #2002-29

TO: All ISIS HR Paid Agencies

FROM: Jena W. Cary
Director

SUBJECT: Use of FICA Refund Codes by Agencies

As outlined in OSUP Memorandum #2002-08, dated July 20, 2001, when agencies retroactively change the tax model of an employee, the ISIS HR system does not automatically generate retroactive refunds to Social Security and/or Medicare that are a result of this change. Under these circumstances, manual adjustments by the agency and OSUP are required to refund both the employee and employer shares and to update the accumulators that affect the W-2. **These manual adjustments must not be entered by the agency without first contacting the Wage and Tax Administration (WTA) Unit of OSUP.** If agencies process adjustments without notifying OSUP, W-2 information will not be updated and employees will receive incorrect W-2s. This will require that a W-2c be processed.

In order to identify employees who may need manual adjustments, the WTA Unit runs a report daily that lists employees with tax model changes. OSUP will contact the agency and relay the proper amounts to be refunded to the employee along with instructions. If agencies have not been contacted by OSUP about an employee who needs manual adjustments due to a tax model change, please call one of the following members of the WTA Unit for assistance:

Cindy McClure 342-1652
Rhonda Desselle 342-8928

Rachel Bryant 342-1651
Lawanna Green 342-0714

JWC:RJB/kmb